SureMed

# User Guide

## Completing and Submitting SureMed Information Requests to an Insurer via Konnect NET

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March 2013

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## 1. Introduction: About Konnect NET - SureMed

SureMed enables rapid and secure collection of medical information required for reviewing an insurance application.

Konnect NET has commissioned MedTech to develop new e-forms to support and improve the review and submission of Medical Information to Insurers.

**Objectives for developing the SureMed Information Request Form:**

- An efficient, streamlined and standardised process for fulfilling information requests:
  - enables GP's to rapidly review and select medical information to be provided to Insurers
  - frees up time for patient care
  - ultimately leads to a faster turnaround time on insurance policy applications made by clients
- Better patient outcomes:
  - patients get the insurance they need to cover their risks
  - transparency of information and the process of retrieving information
- Confidential and secure information transfer
- Privacy protection of personal medical information, that meets industry and legal requirements
- Automatic payment for processing information requests, once completed

## 2. Who should use this guide

**This user guide is intended for:**

General Practitioners and practice staff who will be responding to Konnect NET SureMed Requests.

## 3. Where to get help

**For Medical Providers:**

- Contact MedTech support line on **09 358 0116** for technical queries with the form
- Contact HealthLink on **0800 288 887** for any queries with HealthLink connections or acknowledgement messages
- Contact the Konnect NET Team **on 0800 KONNECT** (0800 566 632) for any queries related to SureMed

## 4. Before you begin

**Ensure the following:**

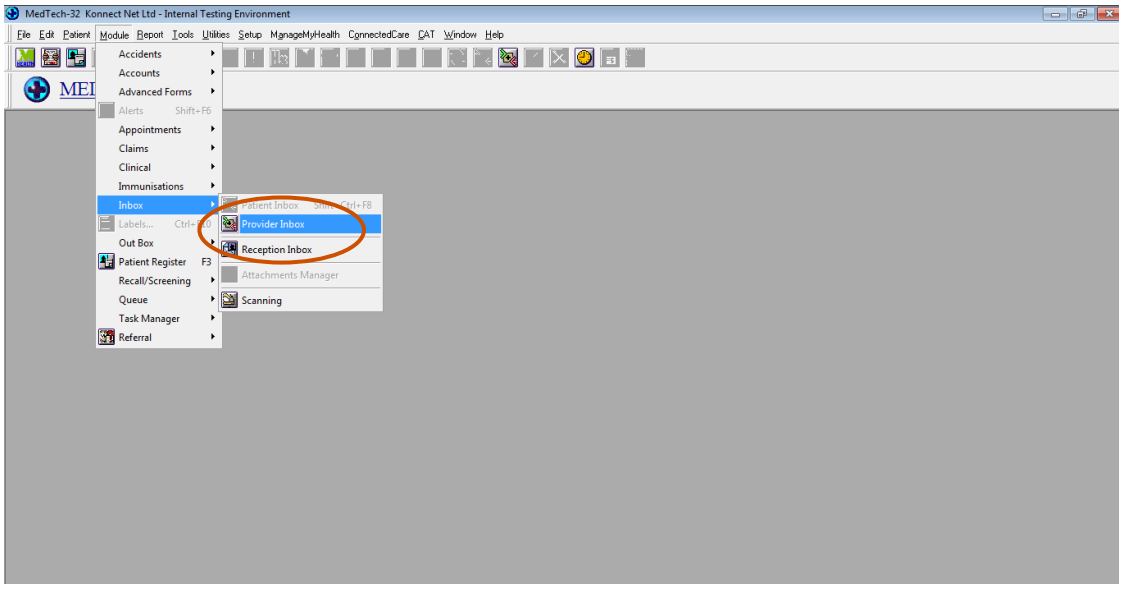
- You are using MedTech-32 V20 or above. To confirm that, start MedTech-32. **Click on Help/About MedTech-32**
- You have a HealthLink connection
- The patient details for the patient for whom the SureMed Form is being created are loaded in the system and are complete

## 5. Types of SureMed Medical Forms

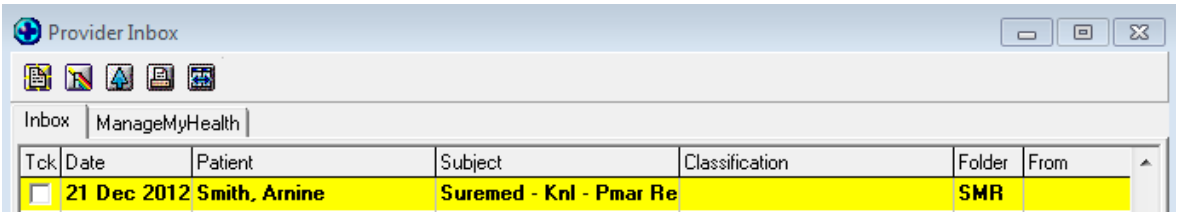
The SureMed request may combine one or more of the following elements:

- SureMed PMAR Request (Patient Medical Attendant's Record) - typically requested if your patient is over a set age, or if they are seeking insurance over a certain dollar amount (age and amount thresholds are set by the insurers).
- SureMed Questionnaire – requested where the patient has identified that they have a pre-existing condition (eg. Diabetes, Asthma, Epilepsy etc).
- SureMed Exam Own Doctor – typically requested where the patient has not been seen by their doctor for a period of time, is over a set age, or are seeking Insurance over a certain dollar amount.
- SureMed Build Exam (BMP & BP) – a short build examination that can be completed by nursing staff.

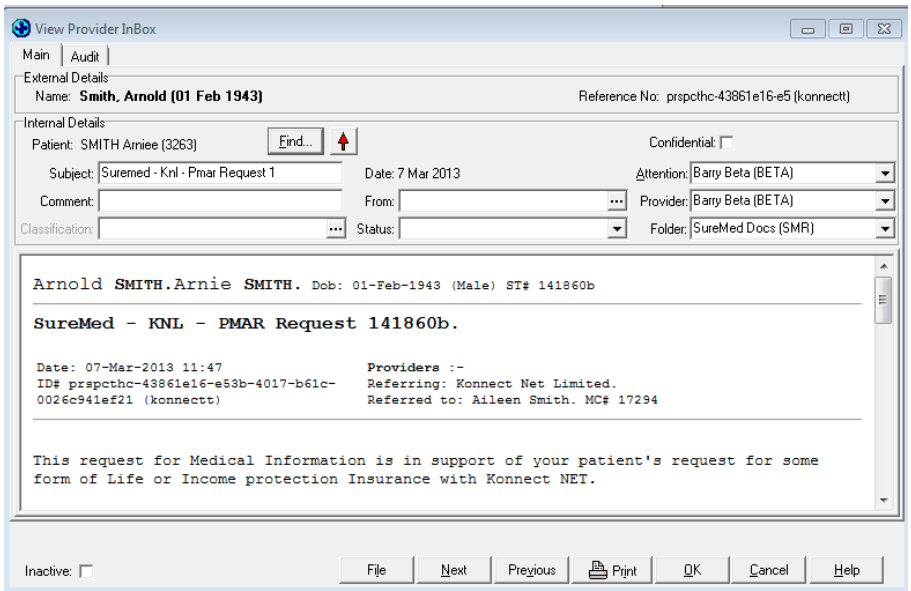
## 6. Opening a SureMed Information Request Form



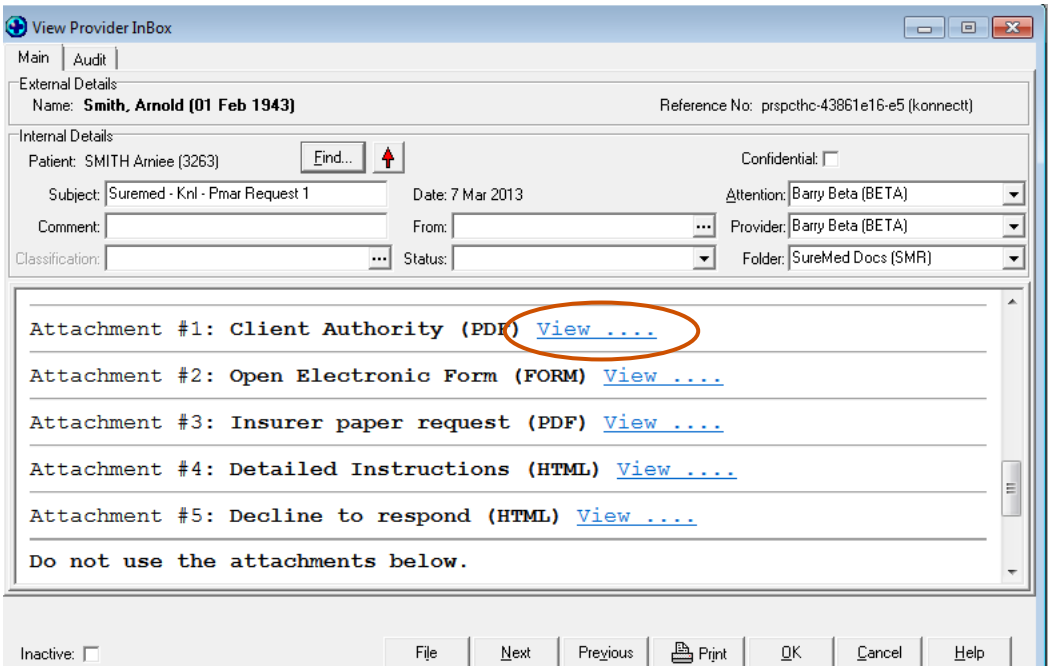

When an insurer sends you a request, the message will show up in your Provider Inbox as a SureMed Information Request in your SureMed Docs (SMR) folder.


Provider Inbox
Inbox
ManageMyHealth
Tck Date Patient Subject Classification Folder From
21 Dec 2012 Smith, Arnine Suremed - Knl - Pmar Re SMR

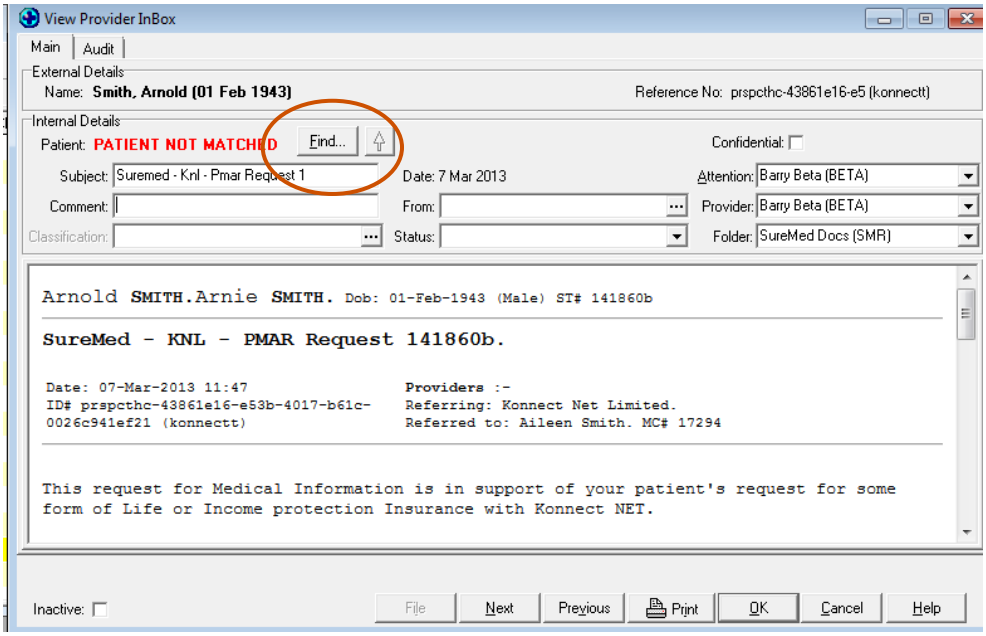
To view the Message, simply double click the applicable row. This will open up a SureMed message with the request and (where the patient is not required to be present) the patient's authority to release their medical information.



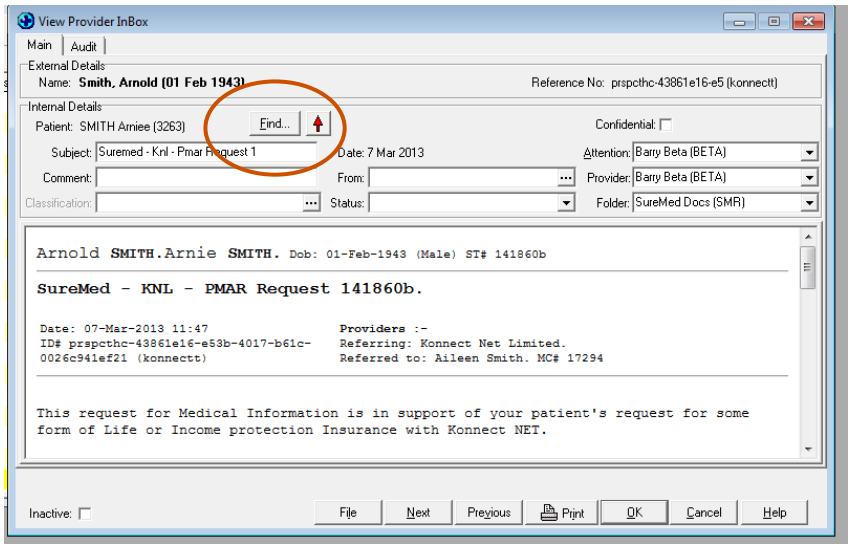
To view the patient's authority, click on the highlighted **View** next to 'Client Authority'.



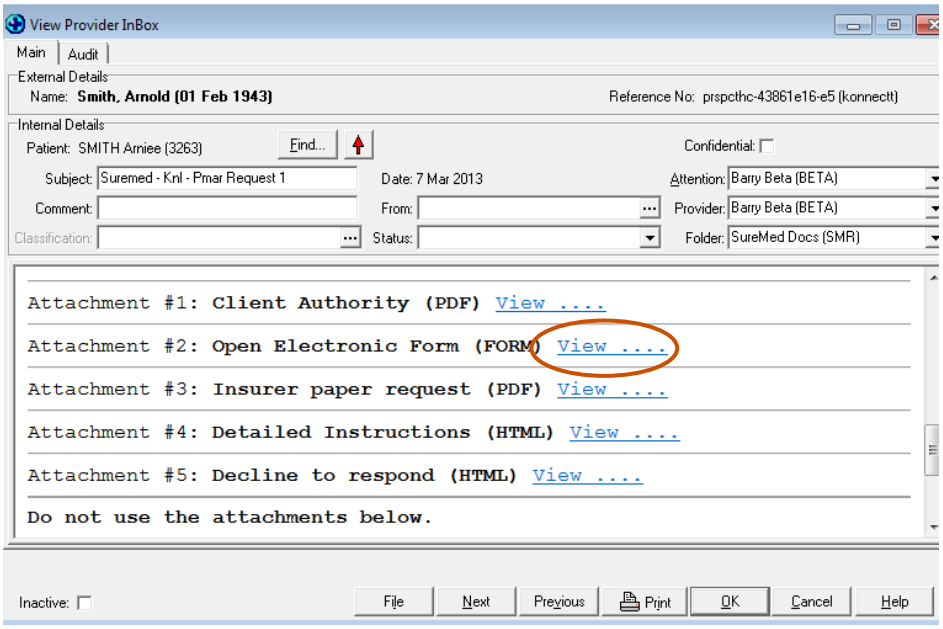

If the patient is not matched, please locate them in your Medtech database by clicking **FIND.**



When you have matched the patient with the request, click the arrow to make the patient the **Active Patient.**




To open the SureMed request, click on the highlighted **View** next to 'Open Electronic Form'.



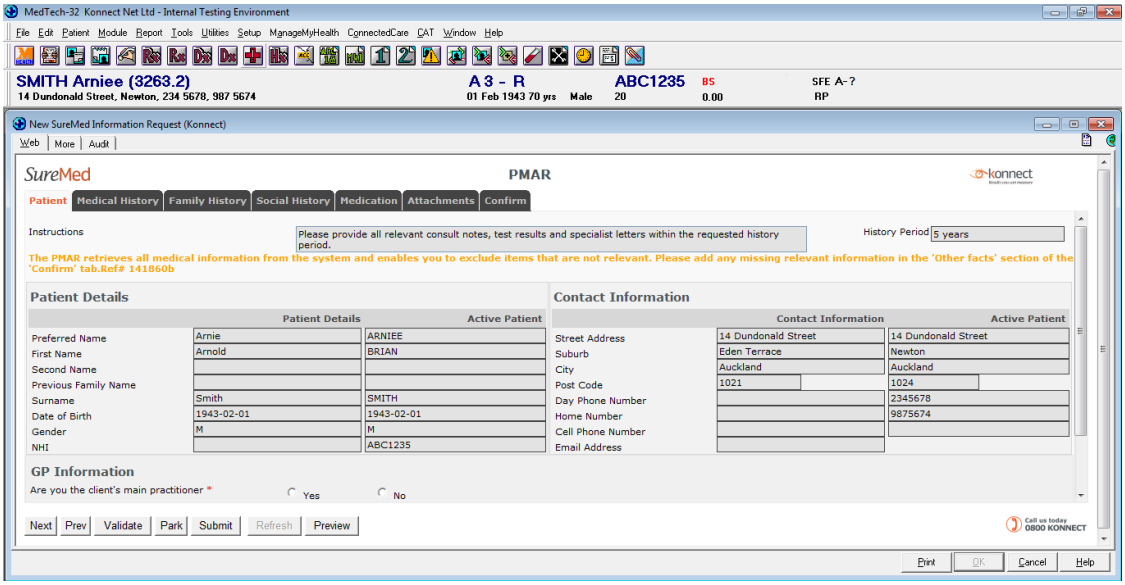

This will open up the Konnect SureMed Information Request.

# 7. Completing a SureMed Medical Request Form

## 7.1 Patient Tab

The patient tab provides you with a comparison of patient information that you hold in your system against information provided by the insurer. This will enable you to confirm that the patient record relates to the person for whom the insurer is seeking information.

**Important: Please pay special attention to any Insurer comments**

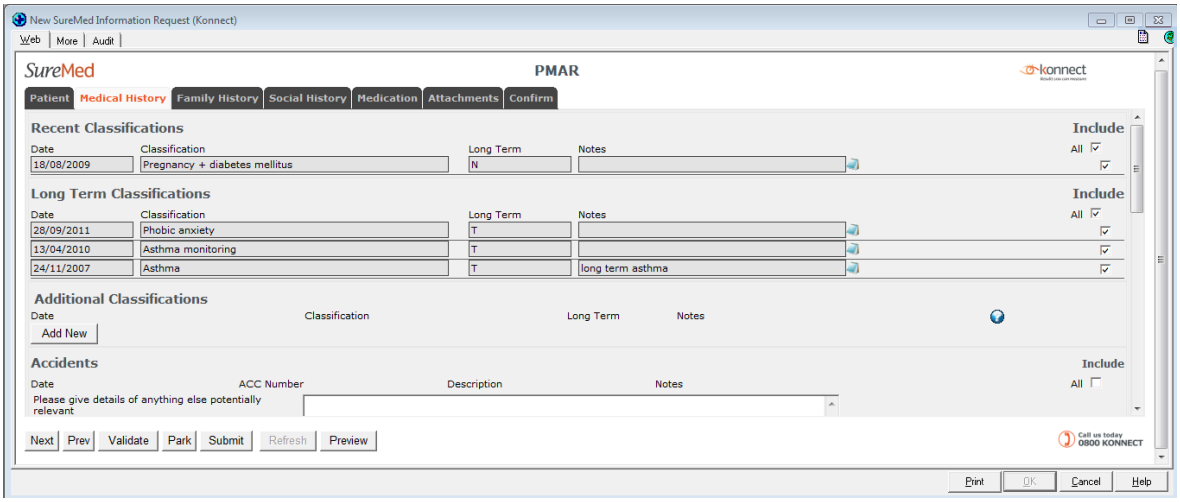



If you see yellow, this indicates a discrepancy between the Patient Details *(whom the insurers have requested data on*) and the Active Patient *(the patients details recorded at the practice)*

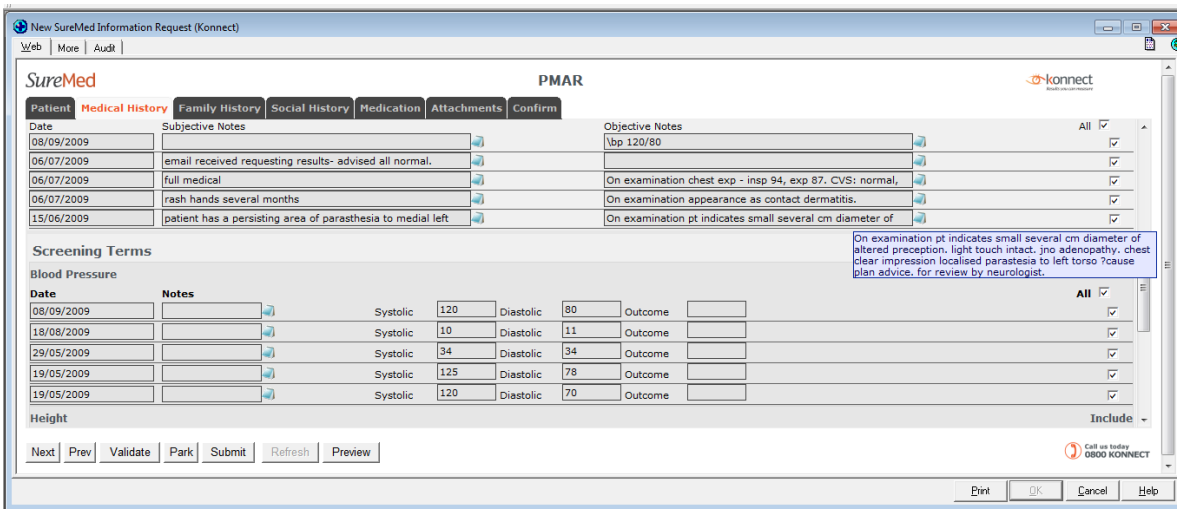
## 7.2 Medical History

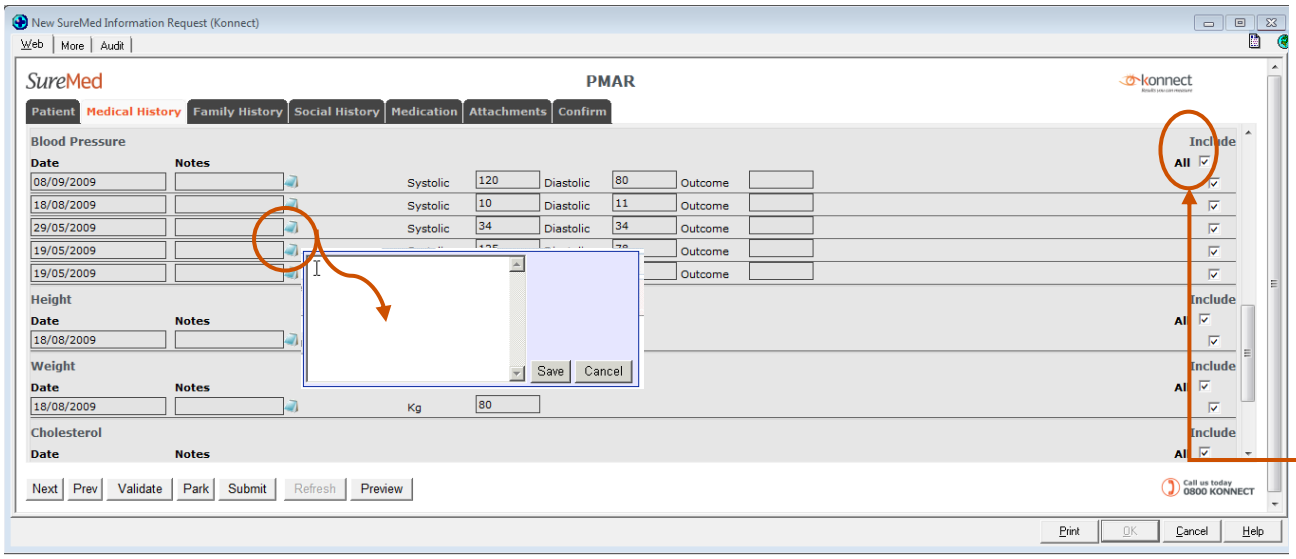
This tab enquires about the Patient's medical history with your Practice.

**Important: Please note all fields denoted by a red asterisk *, are mandatory fields.**



You can read the entire comment by simply moving your mouse pointer over the comment, and simply click on the note pad image to edit any of the data.

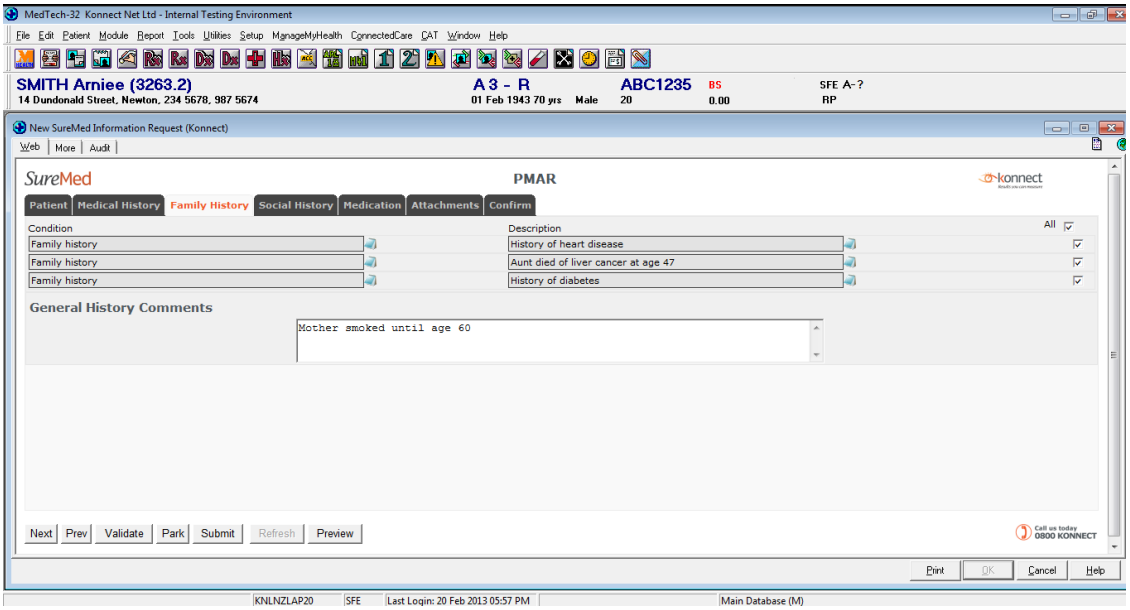


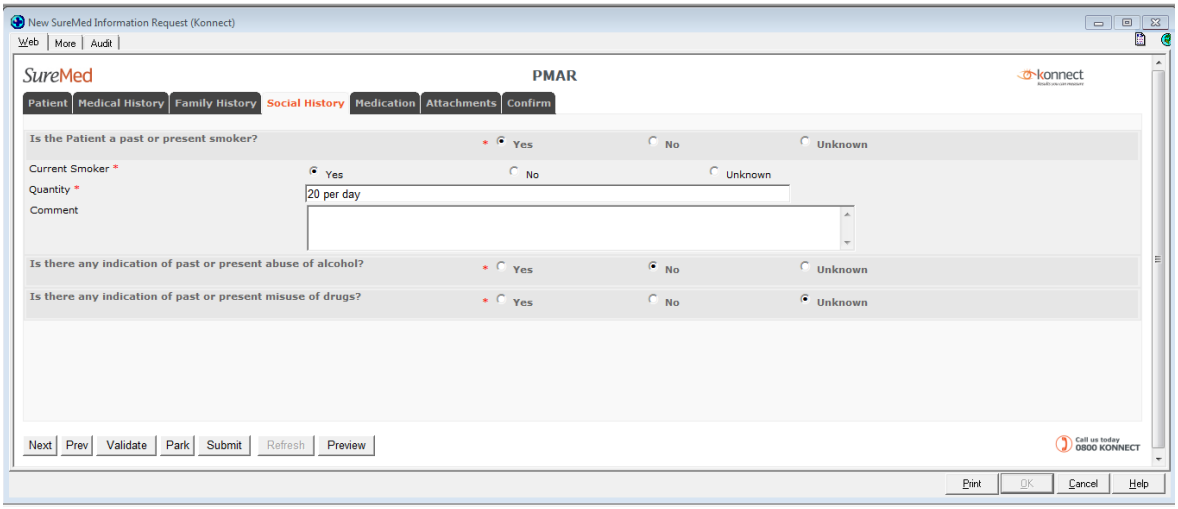

As this form automatically populates information from your Medtech database, comments – if any – will also show. To add a comment or edit an existing one, simply click on the icon next to the comment field. This will bring up a text field for you to enter your comments. Press **Save** after you have finished.

**Important: To 'Exclude' information, please untick the boxes on the right hand side**

## 7.3 Family History Tab


MedTech-32 Konnect Net Ltd - Internal Testing Environment
SMITH Arniee (3263.2)
14 Dundonald Street, Newton, 234 5678, 987 5674
A 3 - R
01 Feb 1943 70 yrs Male
ABC1235
20
0.00
SFE A-?
RP
New SureMed Information Request (Konnect)
Web | More | Audit
SureMed
PMAR
konnect
Patient | Medical History | Family History | Social History | Medication | Attachments | Confirm
Condition
Description
All
Family history
History of heart disease
Family history
Aunt died of liver cancer at age 47
Family history
History of diabetes
General History Comments
Mother smoked until age 60
Next | Prev | Validate | Park | Submit | Refresh | Preview
Print | OK | Cancel | Help
KNLNZLAP20 | SFE | Last Login: 20 Feb 2013 05:57 PM | Main Database (M)

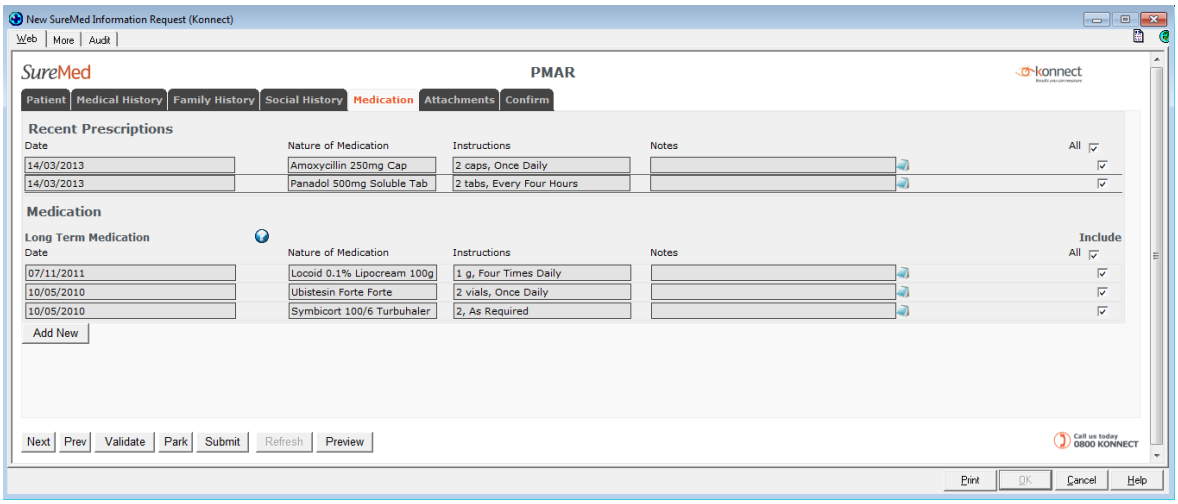
## 7.4 Social History Tab


New SureMed Information Request (Konnect)
Web | More | Audit
SureMed
PMAR
konnect
Patient | Medical History | Family History | Social History | Medication | Attachments | Confirm
Is the Patient a past or present smoker? * Yes No Unknown
Current Smoker * Yes No Unknown
Quantity * 20 per day
Comment
Is there any indication of past or present abuse of alcohol? * Yes No Unknown
Is there any indication of past or present misuse of drugs? * Yes No Unknown
Next | Prev | Validate | Park | Submit | Refresh | Preview
Print | OK | Cancel | Help

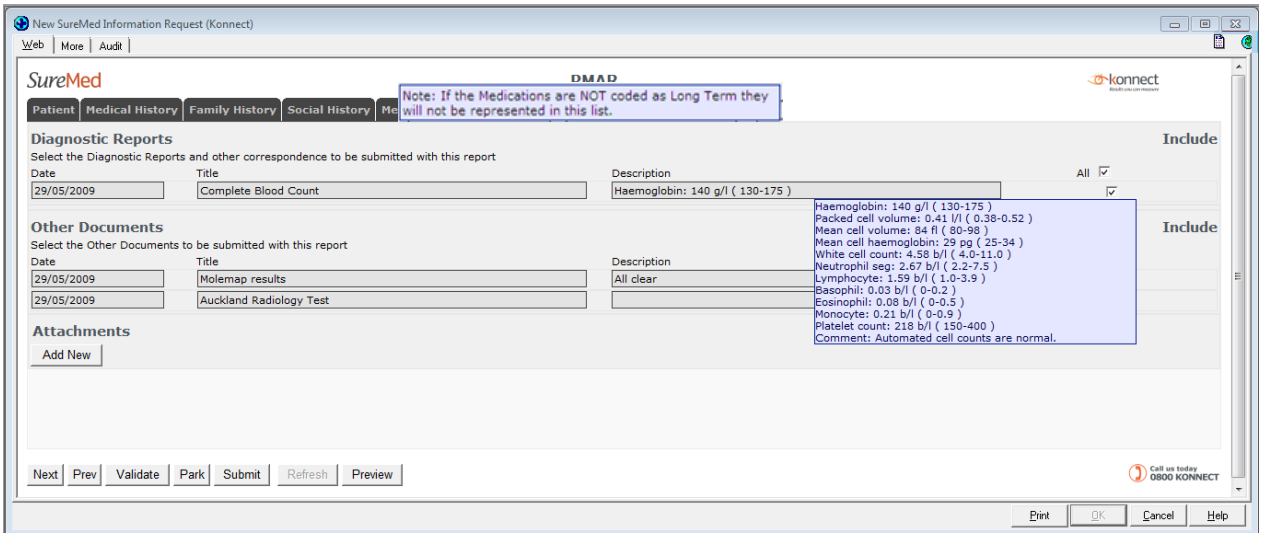
Please note, you will be asked to **comment** on any mandatory questions that you have ticked '**Yes**' to.

## 7.5 Medications Tab

If the patient is currently on any long term medication, the question will default to '**Yes**' and a list of current long term medications will be displayed. You can choose to 'Include' necessary information or untick the box if it is not applicable to the Request.


New SureMed Information Request (Konnect)
Web | More | Audit
SureMed
PMAR
konnect
Patient | Medical History | Family History | Social History | Medication | Attachments | Confirm
Recent Prescriptions
Date | Nature of Medication | Instructions | Notes | All
14/03/2013 | Amoxycillin 250mg Cap | 2 caps, Once Daily
14/03/2013 | Panadol 500mg Soluble Tab | 2 tabs, Every Four Hours
Medication
Long Term Medication
Include
Date | Nature of Medication | Instructions | Notes | All
07/11/2011 | Locoid 0.1% Lipocream 100g | 1 g, Four Times Daily
10/05/2010 | Ubistesin Forte Forte | 2 vials, Once Daily
10/05/2010 | Symbicort 100/6 Turbuhaler | 2, As Required
Add New
Next | Prev | Validate | Park | Submit | Refresh | Preview
Call us today 0800 KONNECT
Print | OK | Cancel | Help

## 7.6 Attachments


New SureMed Information Request (Konnect)
Web | More | Audit
SureMed
konnect
Note: If the Medications are NOT coded as Long Term they will not be represented in this list.
Patient | Medical History | Family History | Social History
Diagnostic Reports
Include
Select the Diagnostic Reports and other correspondence to be submitted with this report
Date | Title | Description | All
29/05/2009 | Complete Blood Count | Haemoglobin: 140 g/l ( 130-175 )
Haemoglobin: 140 g/l ( 130-175 )
Packed cell volume: 0.41 l/l ( 0.38-0.52 )
Mean cell volume: 84 fl ( 80-98 )
Mean cell haemoglobin: 29 pg ( 25-34 )
White cell count: 4.58 b/l ( 4.0-11.0 )
Neutrophil seg: 2.67 b/l ( 2.2-7.5 )
Lymphocyte: 1.59 b/l ( 1.0-3.9 )
Basophil: 0.03 b/l ( 0-0.2 )
Eosinophil: 0.08 b/l ( 0-0.5 )
Monocyte: 0.21 b/l ( 0-0.9 )
Platelet count: 218 b/l ( 150-400 )
Comment: Automated cell counts are normal.
Other Documents
Include
Select the Other Documents to be submitted with this report
Date | Title | Description
29/05/2009 | Molemap results | All clear
29/05/2009 | Auckland Radiology Test
Attachments
Add New
Next | Prev | Validate | Park | Submit | Refresh | Preview
Call us today 0800 KONNECT
Print | OK | Cancel | Help

Once again, the form will automatically populate with all the attachments relevant to the Patient's history. You can '**Include**' what is applicable.

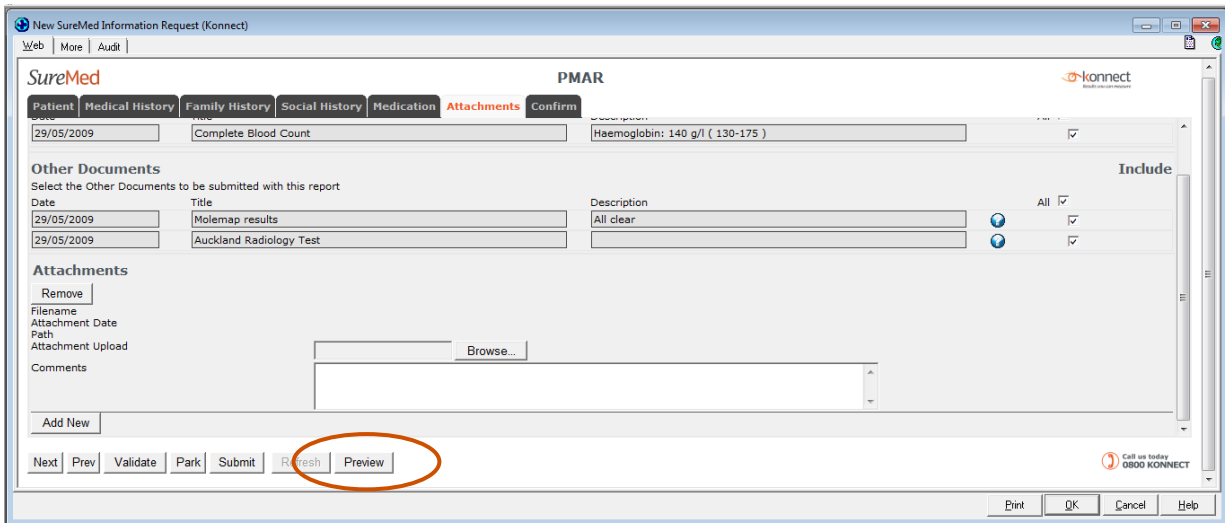
To read the complete description, simply roll your mouse pointer over the field you wish to read. This will display the complete description.

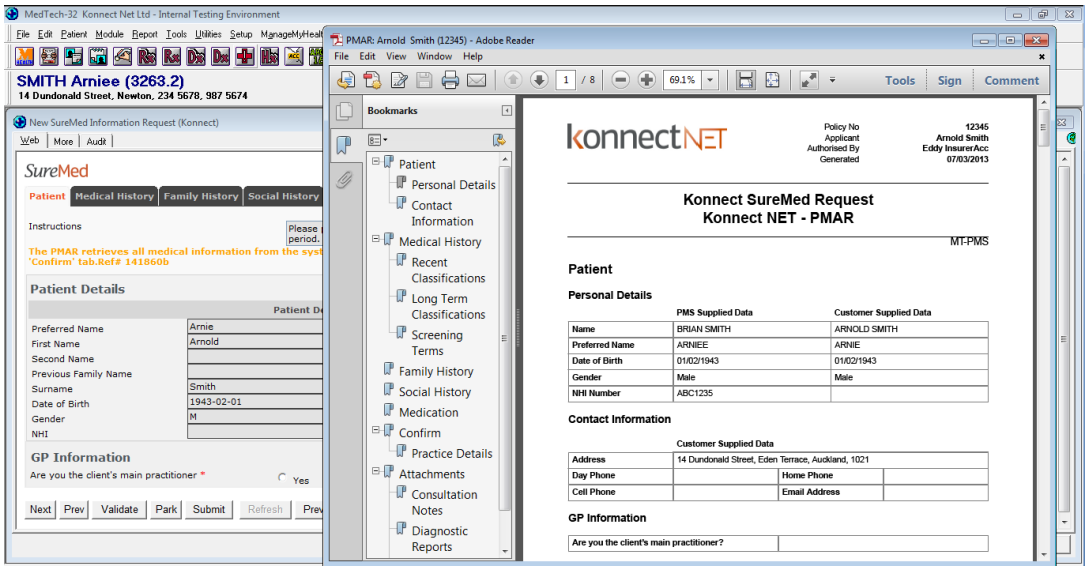
If you wish to add files that have not automatically populated,

- Tick on the '**Add New**' button under 'Attachments'
- Browse for your file on your hard disk and click **OK**

## 7.7 Preview Report

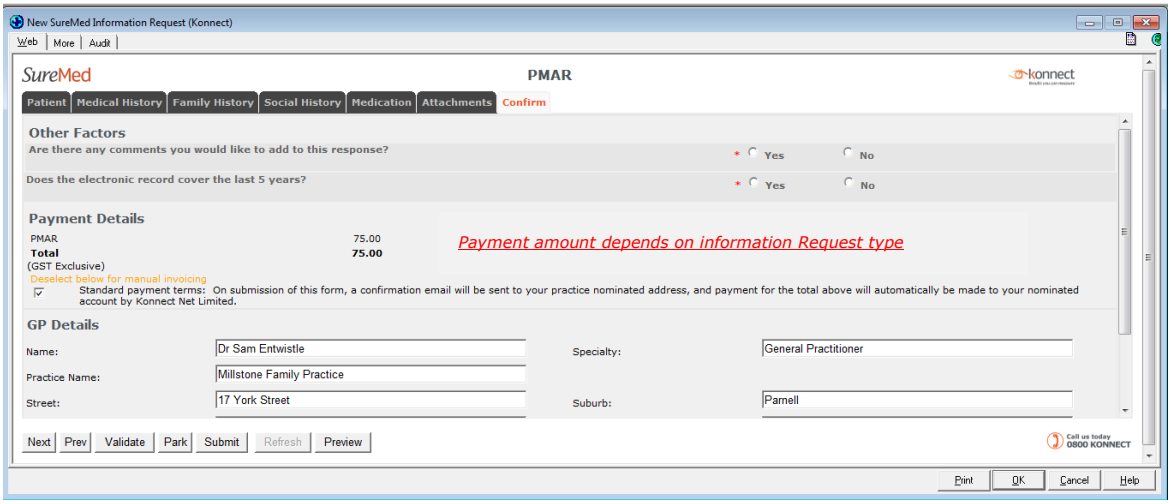
You can preview the report as a PDF prior to submitting the report



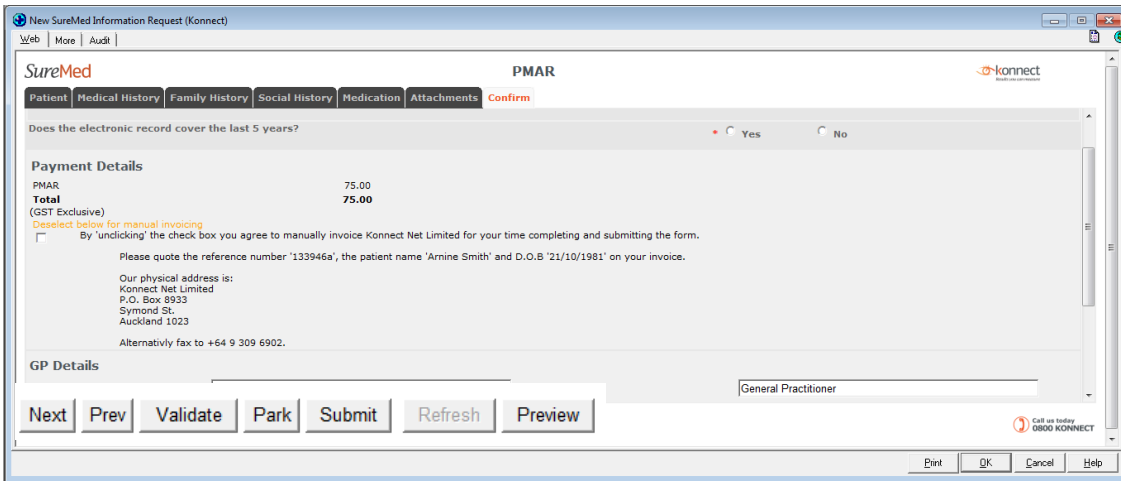
## 7.8 Confirm Tab

The confirm tab includes final summary questions, payment details, and GP details.




**Important: Konnect NET pays GP's weekly for SureMed requests completed in line with guide prices (which vary according to the information requested).**

**Where additional expense has been incurred Konnect NET can be manually invoiced, by unticking the check box under Payment details.**




## 8. The Navigation Buttons

**Next** - takes you to the next screen
**Prev** - takes you to the previous screen
**Validate** - checks if all mandatory fields have been completed (Incomplete fields show up in red)
**Park** - saves a partially completed form to MedTech
**Submit** - checks that the form is valid and submits the form
**Preview** - previews the form as a PDF

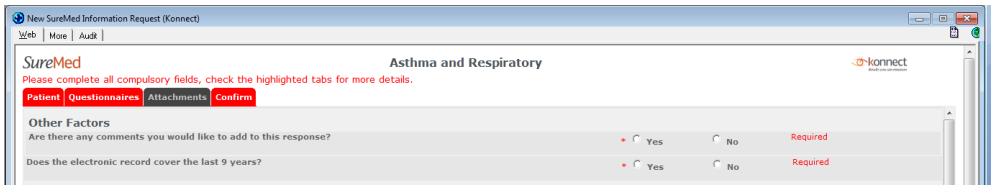
## 9. Submitting the SureMed Medical Request Form

Once you have entered all the details on the SureMed Request, you are ready to submit it to Konnect.

To complete the process,

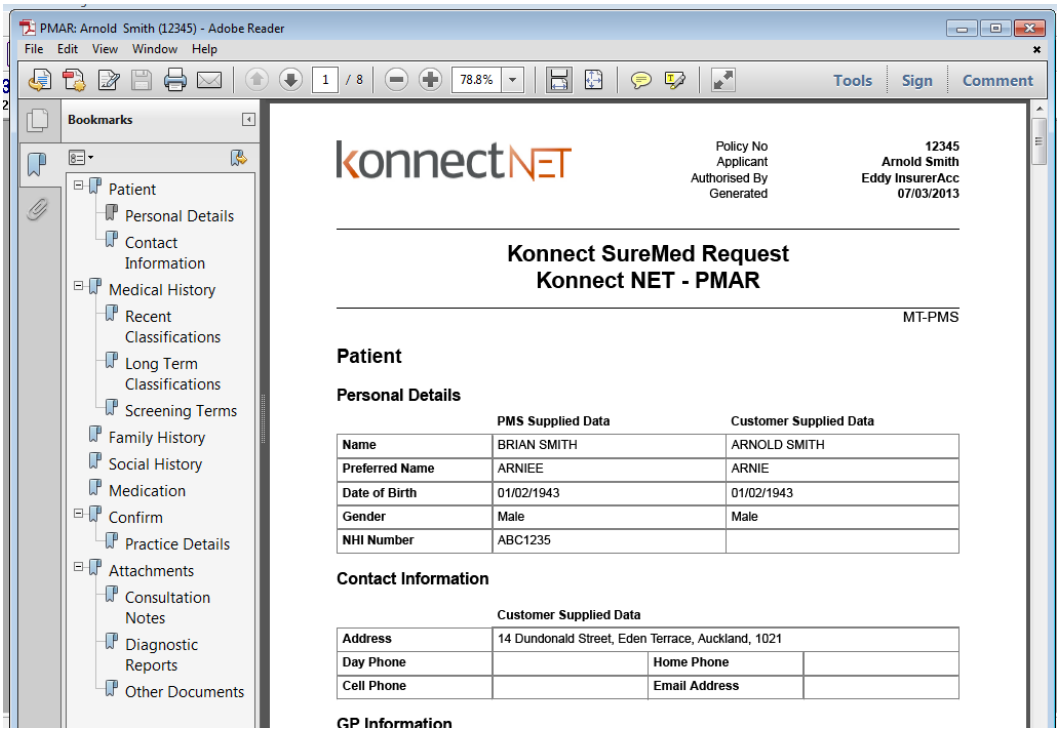
Click on the **Validate** button.

- Tabs which have unanswered questions or which have not been correctly completed will turn **Red**
- Answer the questions or amend the errors and click on **Validate** again
- If there are no errors, the system will notify you that the form is valid
- Click **OK** to accept it



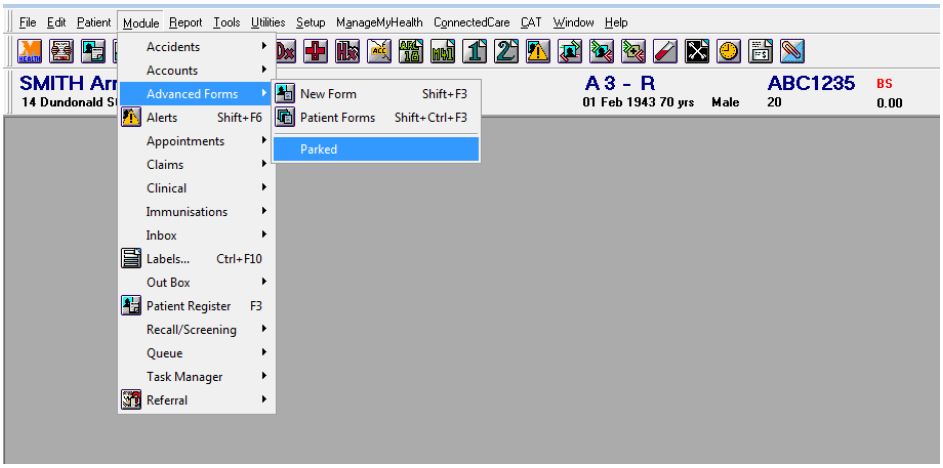

Click on the **Submit** button.

- The system will close the SureMed Request Form and display a PDF Report of the Request.
- The Report will then be encrypted and sent via HealthLink to Konnect NET's secure database. (only the Insurers designated team will have access to this information).
- A copy of the Report will be stored in your Medtech database against the Patient's record. It can be accessed from the Patients OutBox, or Daily Record in the Patient Manager (Shortcut F6).

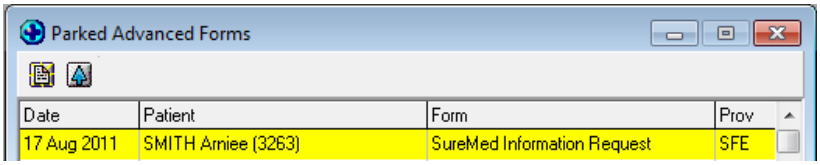


## 10. Retrieving a Parked SureMed Request Form

A parked SureMed Request Form can be retrieved by selecting **Parked** from the Module menu under Advanced Forms.

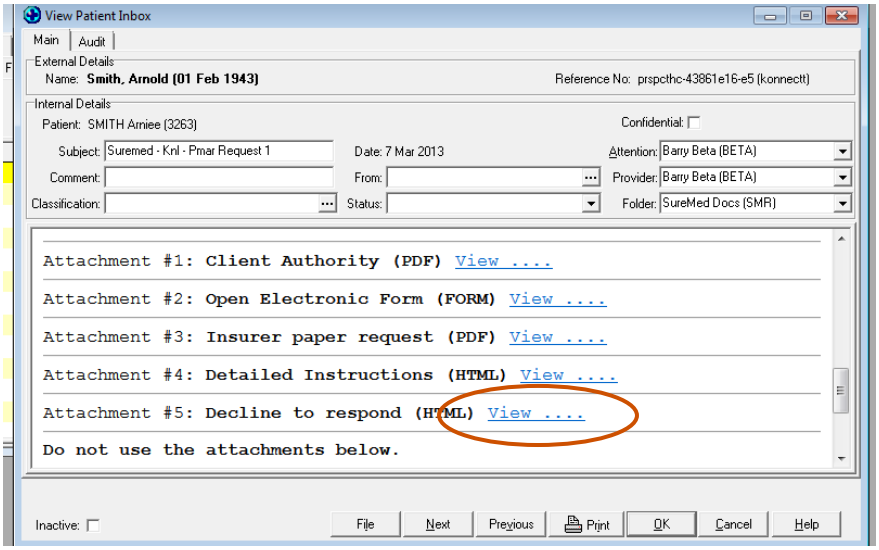



A list of all parked forms will be displayed, double click the SureMed form you wish to complete.

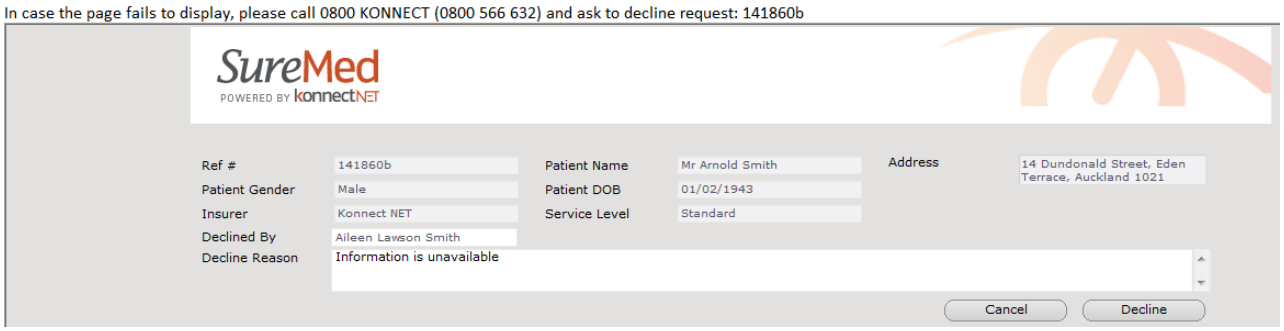



## 11. Declining a SureMed Medical Request Form

Should you choose to decline completing the Request Form (if for example the Patient does not belong to your practice, or if you do not hold any medical information on the Patient), click on the highlighted **View ...** link which is next to the 'Decline to respond' text.

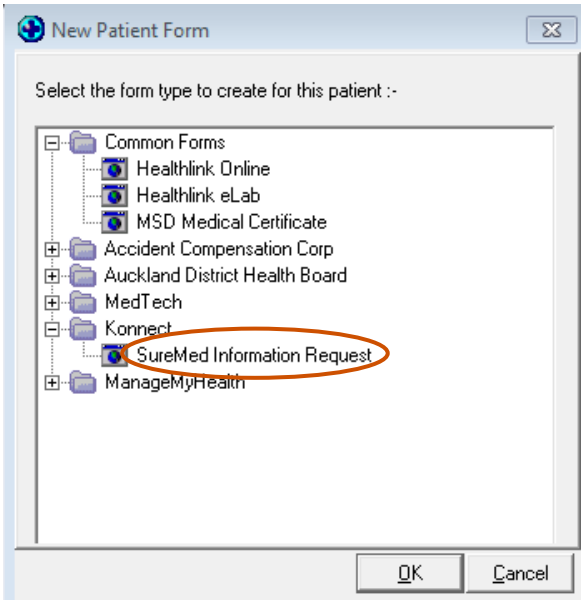


This will display a screen where you can enter a Decline reason, which will be communicated to the Insurer.


In case the page fails to display, please call 0800 KONNECT (0800 566 632) and ask to decline request: 141860b
SureMed
POWERED BY konnectNET
Ref # 141860b
Patient Name Mr Arnold Smith
Address 14 Dundonald Street, Eden Terrace, Auckland 1021
Patient Gender Male
Patient DOB 01/02/1943
Insurer Konnect NET
Service Level Standard
Declined By Aileen Lawson Smith
Decline Reason Information is unavailable
Cancel
Decline

## 12. Alternative method to open the SureMed request

Go to the Module menu and select **New Form** under Advanced Forms (shortcut Shift+F3)
From the list, select the Konnect Folder, then SureMed Information Request and click **OK**.




Click **OPEN** next to the patient's details for the Request you are responding to. This will open the SureMed Form that has been automatically pre-populated with the patient's medical history from your PMS database.